United Nations
Economic Commission for Europe

Food and Agriculture Organization
of the United Nations

ECE/TIM/INF/7

TIMBER AND FOREST INFORMATION SERIES

TIMBER COMMITTEE YEARBOOK

2000

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Timber Section
Geneva, Switzerland

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New York and Geneva, 2000

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ABSTRACT

The UN-ECE Timber Committee Yearbook 2000 contains an overview of the Committee's activities and bibliographical references for its publications. The Committee's activities include broadly: contributing to follow-up to UNCED and the pan European Ministerial Conference for the Protection of Forests; its annual session as well as those of its subsidiary bodies and teams of specialists; collection and analysis of statistics on forest products, forest products markets and forest resources; promotion of sustainable forestry; and, assistance to countries in transition in central and eastern Europe.

THE UN/ECE TIMBER COMMITTEE YEARBOOK 2000

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PREFACE

The *Yearbook* is intended to disseminate the information on the Timber Committee's activities among those for whom it would be most useful - experts in the fields under consideration. The aim is twofold: to provide an overview of the Committee's activities; and to provide bibliographical references, so that interested experts may obtain the necessary documents as quickly and easily as possible. The *Yearbook* can not be an exhaustive account of all the Committee's activities, which are set out in the Committee's formal report and associated documents.
The development of the Timber Committee website (see address below) constitutes a complement to the *Yearbook* as it contains more detailed information on the numerous activities and is updated constantly.

Information about the publications or any other aspect of the Committee's work may be obtained by writing to the secretariat:

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I. THE TIMBER COMMITTEE'S ACTIVITIES IN 1999

1. Forest Resource Assessment 2000 - Temperate and Boreal Zones

The Temperate and Boreal Forest Resources Assessment (TBFRA-2000) was finalised, and the Main TBFRA-2000 Report *Forest Resources of Europe, CIS, North America, Australia, Japan and New Zealand* was sent for publication at the end November 1999. The report presents about 500 pages of the most recent and the best possible information on the forest resources of the fifty-five industrialized temperate/boreal countries, covering practically all aspects and functions of the forest. The close cooperation with participating countries at all stages of the assessment was an essential prerequisite for a satisfactory implementation of the study.

The TBFRA study is not only an important UN-ECE/FAO contribution to the Global FRA-2000, but also a most comprehensive and reliable information pool for the discussion within the pan-European Process on the Protection of Forests and for the IFF/CSD international forest policy dialogue.

In May 1999 the Joint UN-ECE/FAO Working Party on Forest Economics and Statistics reviewed the draft TBFRA-2000 report and considered the results of the assessment as a whole. The Working Party expressed its warm appreciation of the work done by the national correspondents, the team of specialists on TBFRA-2000, consultants, the secretariat and all those involved in the project, the preparation of the main report and the elaboration of the TBFRA electronic database.

The report presents validated national statistical data adjusted to the TBFRA standards, graphs, tabular and textual information and analysis in the following specific thematic domains: areas of forest and other wooded land, ownership and management status, wood supply and carbon sequestration, biological diversity and environmental protection, forest condition and damage and protective and socio-economic functions. It also includes a section with an analysis of the reliability and comparability of the TBFRA data, an Executive Summary, as well as the methodological components of the study including the enquiry and terms and definitions.

The publication of the TBFRA-2000 Main Report is by no means the end of the process. After the publication of this volume, the database will be finalised and a number of satellite follow-up papers prepared. The next phase of the assessment has already started by providing the temperate/boreal forest resources data from TBFRA to the Global FRA-2000 database. The data will be fully integrated into the global assessment together with notes and comments which have been provided by national correspondents. In a later phase the data will also be made available in electronic format (CD-ROM and Internet).

The TBFRA success has made it possible to identify areas which need further exploration in the interest of improving knowledge of the world's forests, e.g. on "protected forest areas" on which further understanding is currently needed. The work with countries in such areas will be continued in the nearest future.

The ultimate goal now is to make the TBFRA data available to as many users as possible. In any case the UN-ECE/FAO and its partners will maintain their commitment to providing good quality data on the world's forests to users all over the world. The next meeting of the team of specialists on TBFRA, which is scheduled in May 2000 in Joensuu (Finland), will review the findings and main results of the assessment, as well as the lessons learned from the project implementation and provide recommendations for future activities in this area.

2. Promotion of sustainable forest management in the region

Monitoring and analysis of sustainable forest management in the region is at the heart of the Timber Committee's programme of regular statistics, market analysis and intergovernmental exchange of information and experience.

In 1999, the Committee's major contribution to improving knowledge and understanding of the forest sector was the Temperate and Boreal Forest Resources Assessment 2000 (TBFRA), described above. This study will enable governments and others to have the quantitative, region-wide overview, based on reliable, comparable data, which is necessary to formulate realistic forest policies, and provide the community of those interested in international developments with a major tool for their work.
Other noteworthy achievements of 1999, all reported elsewhere in this Yearbook, were the monitoring of markets for certified forest products, the new enquiry on protected forest areas, the special topic on trade and environment issues in the forest sector, and the start of work on public participation in forest sector decision making.

Most of these activities are carried out in close cooperation with the pan-European Ministerial Conference on the Protection of Forests.

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3. Trade and environment issues in the forest and forest products sector

The interaction of trade policies and environment policies, and the challenge of finding synergies between them, have been the subject of some of the most interesting and passionate discussion concerning the forest sector over the 1990's.

For that reason, the Timber Committee organised a special topic discussion at its session in September 1999. Four high level speakers presented their views on the major issues:

- Carol Cosgrove-Sacks, Director, UN/ECE Trade Division,
- Jan Eirik Sorensen, Director of Trade and Environment at the World Trade Organisation,
- Charles Arden-Clarke, Chief of trade and environment at WWF International, and
- Al Fry, representing the World Business Council for Sustainable Development.

These presentations were followed by a lively discussion. The presentations and the main issues will be summarised in discussion paper to be published in spring 2000.

The Timber Committee will decide in October 2000 what future work, if any, it wishes to undertake on issues of trade and environment in the forest sector. By that time, it will be possible to take into account the results of the Intergovernmental Forum on Forests which will complete its work in February 2000, and submit its conclusions, including on trade and environment issues to the Commission on Sustainable Development.

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4. Study tour in Ireland

The joint Timber Committee and European Forestry Commission Study Tour of Ireland's forests and forest industries was well organized and graciously hosted by Coillte Teoranta, the Irish Forestry Board. The tour included guided visits to both softwood and hardwood forests. Through intensive afforestation efforts over the last 50 years, originally by the Government, and now in the last 10 years by Coillte, farmers and private investors, Ireland now has approximately 8 percent forest cover or 600,000 hectares. With a goal to double forest cover to 17 percent by 2025, abandoned grazing land is converted to exotic and native softwoods and

hardwoods. Ireland is preparing for certification of its forests according to international standards for sustainable forest management a direct result of the United Kingdom forests' requests for assurances of sustainability.

Simultaneously with afforestation, substantial economic development in the forest products industry and development of overseas markets is taking place. The tour included visits to a sawmill, OSB and MDF plants and a moulded fibreboard plant. The sawmill and the panel plants produced both commodity products as well as value-added products.

In addition participants experienced the warm Irish hospitality and learned about the host's culture. Based on a questionnaire and a group discussion, all 30 participants were satisfied with the tour and encouraged the secretariat to facilitate future tours, perhaps including a current issue as a theme if it was relevant to the host country.

On behalf of the Timber Committee and the European Forestry Commission, the tour participants and the office holders, the secretariat wishes to again express their deep appreciation to Coillte for the warm hospitality and excellent tour. The insights into Ireland's forests, forest industries, culture and beauty will benefit us and our colleagues.

Next study tour. Certification of sustainable forest management will be the central main theme of the next tour in eastern and western Canada in September 2000. As information on the tour becomes available it will be posted on the Timber Committee website.

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5. Assistance to countries in transition of central and eastern Europe

The UN ECE Timber Committee provides assistance and develops the cooperation with countries of central and eastern Europe in transition (CITs) in order to promote the process of economic reform in their forest and forest products sector. The team of specialists (ToS) guides this work and ensures at its regular sessions that the themes and topics of cooperation and assistance are in line with the priorities and needs identified by the countries concerned. The Timber Committee at its last session in September 1999 extended the team's mandate and terms of reference until the year 2002.

The Timber Committee secretariat has continued to implement its mandate as international coordinator for the Helsinki resolution H3 on forestry assistance to countries in transition. It collects, stores and analyses relevant information and reports regularly to the parent bodies and, as appropriate, to meetings of the pan-European Process on the Protection of Forests. The electronic database, which includes the information on the topic, supplied by national correspondents or project by project basis has been further developed. The implementation of Resolution H3 was considered at the last meeting of the ToS on CITs in July 1999.

The last meeting of the team, held in Gmunden (Austria) from 29 June to 4 July 1999, reviewed the workshops, meetings, and other activities and projects which were in line with the current and future work of the team. The detailed list of activities carried out in this area are set out in the report of the meeting. A special workshop on Resolution H3 had been planned within the pan-European process. The meeting has tentatively been scheduled to take place in Poland in the year 2000, subject to confirmation.

The team noted that the situation in the forestry sector in different among the countries in transition is different. The transition process would need a lot of patience and persistence, based on a "step by step" approach. As forestry is a "long-term theme", sufficient time would be needed to meet the high expectations raised in CITs. The importance of coordinating the activities of different international organisations and bodies in support of forestry sector of countries in transition has been emphasized.

The team of specialists confirmed (with some modifications) the following three major areas of its

programme of work:

- Institution and capacity building and framework conditions: building the legal and policy infrastructure for sustainable development of the forestry and forest products sector, including extension services, as well as education and training;
- Activities related to the development of market oriented and ecologically sound enterprises in the forestry and forest products sector, with specific references to cross-sectoral and private forest owners issues;
- Issues of general importance for the protection of forests, forest conservation and sustainable development of the forest sector and issues of particular concern for individual countries or group of countries.

The next meeting of the Team of Specialists on countries in transition is tentatively scheduled for the beginning of the year 2001.

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6. Forest products markets, 1998-2000

Introduction. Overall in the ECE region (Europe, North America and the CIS), forest products markets continued to improve in 1998. Total consumption of primary forest products (roundwood, sawnwood, wood-based panels and pulp and paper) rose in Europe and North America, but continued to fall in the Russian Federation. Consumption was forecast to grow in Europe, North America and the Russian Federation in 1999 and 2000 at the September 1999 Committee market discussions. Information for this section comes from two *Timber Bulletins*: *Forest Products Annual Market Review, 1998-1999* and *Forest Products Markets in 1999 and Prospects for 2000*.

Europe. In 1998 European consumption of sawnwood, both hardwood and softwood, was at record levels. Paper and paperboard demand continued climbing beyond the jump in 1997. Overall wood-based panels consumption rose slightly on the strength of record particle board production. On lower volumes, MDF consumption leapt by 20% with corresponding increases in production and imports.

European sawn softwood production rose and trade was active as Europe confirmed its net exporter status. Sawn hardwood consumption rose, showing signs of a new trend, and imports and exports were at record levels.

Roundwood removals (production) in Europe rose to meet the demand for pulpwood (used for pulp and panel furnish) and sawnwood. Pulpwood trade was active: imports expanded strongly within and to Europe, primarily to Finland and Sweden. Imports were mainly from the Baltic Countries and Russia, while eucalyptus came from both inside and outside the region.

North America. The United States was the locomotive in world forest products markets in 1998. Housing construction grew to high levels in 1998 and was still going strong in early 1999. Not only do 1.6 million wooden houses consume tremendous quantities of sawn softwood, but they also spur demand for structural panels, such as OSB, and engineered wood products - these too were at new highs. Sawn softwood consumption reached record highs and although production rose, it still remained at levels below the late 1980s. With new housing the consumption of sawn hardwoods achieved record levels for furniture, millwork and flooring, including an additional 40% that went to packaging and other low-grade uses.

United States imports of sawn softwood and structural panels, primarily from Canada, reached new heights. Canadian sawnwood exports suffered from the Asian crisis but continued expanding to the United States. Production was at record levels in 1998 although not in all provinces.

World pulp markets in 1998 were characterized by oversupply and weak prices. However production

cutbacks, some quite severe, seem to have restored market balance and pulp prices were rising again in mid-1999. North America saw severe pulpwood oversupply with high pulpwood stocks and subsequent rationalization (reduction) in the production of pulp, leading to steeply falling prices.

Central and eastern Europe. The fall in Russian sawnwood production and trade was accelerated by the mid-1998 economic crisis. Nevertheless, one export-oriented sector, woodpulp, expanded production, as did the wood-based panels industry. Other central and eastern European countries exhibited strong signs of recovery of production and exports from early 1998's levels.

Tropical timber. Tropical timber markets experienced an upheaval in 1997 and 1998 during the Asian economic crisis. This affected not only Asia and the other tropical producing regions, but also the ECE region exporters. Recession in Japan, the world's largest forest products importer (the majority tropical timber) had a domino effect on its trading partners. Economic weakness and associated currency devaluations resulted in decreased production and reduction of harvests. Some countries were able to gain export market growth in value added products, such as furniture, which became affordable with the devaluations. In late 1998 and early 1999 some tropical timber markets were recovering, as were exports to Asian markets from ECE region producers.

Certified forest products. Certified forest products are becoming more available, primarily in Europe, but still remain a small part of the forest products trade. Some forests in the ECE region have been certified by the Forestry Stewardship Council, the Sustainable Forestry Initiative and various national schemes. The new Pan European Forest Certification system has the possibility of doubling the area of forests certified in Europe. The majority of the worldwide demand for certified forest products comes from within the ECE region, mainly from Europe and principally from net importing countries. At the present time producers of certified products seek advantages other than immediate profit, such as improved corporate environmental image.

Forest products markets in 2000. At the September 1999 market discussions ECE region countries expressed optimism for the start of the new millennium as forest products consumption increases along with the growing wood resources. Production and consumption of many forest products in Europe and North America were forecast to increase in 1999 and 2000. Housing markets should remain strong thus increasing the demand for sawnwood and wood-based panels. Harvest of roundwood is forecast to increase to meet those demands as well as the higher demand for pulp and paper, and recycled fibre is increasingly used too.

In the Russian Federation considerable optimism was expressed for most forest products market sectors in 1999 and 2000. Continued recovery of Asian imports following the 1998 Asian economic crisis has helped ECE region exporters. Strengthening demand within the ECE region and further recovery of Asian demand could resolve the subregional oversupply of some panel products and pulpwood.

The area of certified forests is increasing in the ECE region and currently potential supply exceeds consumer demand. Some governments have found certification as a valuable means to inform the public about sustainable forest management and the environmental benefits of renewable forest products. Some companies currently justify certified forest products production and trade by advantages other than direct financial benefits.

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7. Forest Economics and Statistics

The Joint ECE-FAO May 1999 the Joint UN-ECE/FAO Working Party on Forest Economics and Statistics on Forest Economics and Statistics Joint held its biennial session in May 1999. It considered the draft Temperate and Boreal Forest Resource Assessment and made detailed recommendations about finalizing and publishing the Assessment (see 1 above). The Working Party welcomed the FAO/ECE/ITTO/Eurostat joint forest sector questionnaire which had significantly clarified and reduced the task of the national

correspondents. It discussed the objectives and methods for future European outlook studies (see 8 below). It also reviewed the first formal study of users of ECE/FAO publications and data, and made recommendations for improvement in them.

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8. European forest sector outlook studies (EFSOS)

Following the publication in 1996 of the outlook study, European Timber Trends and Prospects: into the 21st century, ETTS V, (ECE/TIM/SP 11), a new permanent program of European forest sector outlook studies (EFSOS) was launched in 1999. The program should consider the recent and foreseeable environmental needs of the society, the future competitiveness of timber products on various regional markets and the influence from external factors, such as climate change, along side the traditional wood supply and demand issues. The European Timber Trends Studies are the result of close cooperation between national correspondents and experts and the Timber Section in Geneva. The active support of experts at the national level and the considerable interest in the results of the study are necessary prerequisites for a successful new study round.

In May 1999 the Joint UN-ECE/FAO Working Party on Forest Economics and Statistics asked the secretariat to start work by consulting the Timber Committee, the members of the core team, the bureaux of the Working Party and its parent bodies, as well as others able to contribute.

As a first step the secretariat prepared:

- a systematic comparison of developments in the 1990s with the scenarios of ETTS V;
- a survey of actual and potential users of ECE/FAO outlook studies, to ascertain who they are, and their needs;
- a set of options on methodological strategies, including ideas about periodicity, policy scenarios, geographical and product scope of the next study round.

The Timber Committee in September 1999, discussed the secretariat's proposal and indicated its preferences. It invited countries and partner organisations for increasing contributions, whether in the form of extra-budgetary funds, contributions in kind or division of labour, notably the use of a network of correspondents. The Committee will review and discuss progress on outlook studies and the direction of future work at its next session to be held jointly with the FAO European Forestry Commission in October 2000.

The core team on outlook studies was reconstituted, and will hold a first meeting in March 2000. It is expected to agree on:

- the objectives of the ECE/FAO outlook study;
- the methodological approach and the scenarios;
- the usefulness of recent publications for ETTS purposes;
- a working programme;
- funding of additional manpower resources; and
- necessary public relations activities.

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9. Forest operations of tomorrow

Pessac (France), September 1999

The seminar was held under the sponsorship of the Joint FAO/ECE ILO Committee on Forest Technology, Management and Training and was organized by the Fédération de la Forêt de Gascogne with the cooperation of AFOCEL and of the regional and national French authorities. The theme of the seminar was very topical. The low levels of knowledge and understanding in the general public concerning the forestry sector and its activity constituted one of the most serious threats for the future, and communication with the public needed to be improved.

Social and communication skills should be applied to promote closer cooperation within the forestry sector and to build partnerships with related industries and institutions. Ideally, a clear forest policy and strategy should be adopted and implemented. It should be based on communication with all relevant stakeholders and widely supported by the forestry sector, thus qualifying for solid political backing. Dissemination of existing technologies and methods of work, and the development of new ones are necessary for the economic survival of forest firms. Human factors should be a parameter in the design of new technology and work organization from the very beginning, involving all concerned employees and contractors.

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10. Public Relations in the Forest and Forest Industries Sector

The FAO/ECE Team of Public Relations Specialists in the Forest and Forest Industries Sector met in Sagadi, Estonia in May 1999 and discussed the following issues:

1. the increasing demands placed on the forest and forest industries sector by markets, authorities, forest owners and environmental non-governmental organizations;
2. strategic approaches to professional communications in forestry;
3. PR aspects of timber and forest certification; and
4. the role of wood and forests in carbon sequestration.

The international network of PR specialists in the ECE region now includes 35 countries within the ECE region which have participated in the Team's activities. At its meeting the Team established two new subgroups to conduct work on: capacity building of public relations capabilities in the forest and forest industries sector in central and eastern European countries; a series of European Forums for Forest and Society. (Meeting report available on the PR Team website within the Timber Committee website.)

The Forum Subgroup is organizing the International Forest Communicators Forum 2000 to be held in Canada in September 2000. The forum will provide an opportunity to explore cooperative approaches to marketing wood and paper packaging that transcend specific products or national borders as well as an opportunity to identify potential cooperative efforts and common approaches to promote wood and paper products as renewable, environmentally sound choices. Therefore, the purpose of the forum is to identify the global challenges faced by wood and paper products and to allow participants to share information and success stories, so as to foster the development of approaches and strategies to meet these challenges.

The Team has published *The competitive climate for wood products and paper packaging: the factors causing substitution with emphasis on environmental promotions*. In response to the Timber Committee's request, a Geneva Timber and Forest Discussion Paper has been issued with an expanded executive summary of the report (available from the secretariat and from the Timber Committee website). The report will be a central focus of the International Forest Communicators Forum 2000.

European Forums for Forest and Society (EFFS) are a new arena for exchanging views and building knowledge on international issues relevant to the European forest sector. The major aim of the EFFS is to increase the capacity of decision-makers both within and outside the forest sector to address forest-related

issues. Two-thirds of the participants are to come from outside the forest and forest industry sector, such as political leaders, top-level administrators, corporate executives, researchers and policy makers, NGO leaders, the media and other opinion makers. These forums are in line with the Team's mandate to: promote networking among member states for capacity building and exchange of information; identify key needs for improvement of forest sector public relations; and, stimulate and promote the sound use of wood and other forest products as environmentally friendly and renewable resources. The first forum is planned for June 2000 in Finland.

More information on the Team and its activities may now be found on its website within the Timber Committee site. Presently the site includes subdivisions of its mandate, meetings, members, publications and coming activities.

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11. Recycling, Energy and Market Interactions

In 1999 the Team of Specialists on Recycling, Energy and Market Interactions culminated its work with a report to the Timber Committee and the publication of the proceedings of their workshop in Istanbul, Turkey in November 1998. The Committee thanks the Turkish Ministry of Forestry for hosting and cosponsoring the workshop and publishing the proceedings.

At the 1999 Committee Session, Mr. B. Hillring (Sweden), leader of the Team, presented an overview of their work, including the presentation of the Committee's special topic in 1998 and the outcome of their workshop. The workshop proceedings contain the report and conclusions and one recommendation that the Committee "encourage member governments to implement policies and cooperative projects to promote comprehensive recycling systems for paper and wood fibre and wood-based energy systems. In designing and implementing these systems, the potential effects on timber markets and forest management must be carefully considered."

The Committee thanks the Team for their work and, although the mandate of the Team has ended, it intends to continue to consider wood fuel, new products and recycling in future market discussions. In other areas of the Committee's work the competence of the Team members will be brought back as needed, for example in the market reviews and outlook studies.

II. ACTIVITIES PLANNED FOR 2000 AND 2001

This section is intended to provide readers with information on the Committee's forthcoming activities. It is not a definitive programme, as additions or deletions sometimes have to be made at fairly short notice. Meetings are formally announced by the circulation of a provisional agenda at least three months before their scheduled date, and a press release is also issued.

Attendance at seminars, symposia and study tours organized by the Committee is open to experts in the subjects to be discussed, with permission of their Governments. Further information about all this activities is available on request from the secretariat.

The Timber Committee's annual session

The Timber Committee meets annually generally in Geneva. Its session in 2000 will be held in joint session with the FAO European Forestry Commission in Rome, Italy, from 9-13 October. The main items on the agenda are: international dialogue on forests, support to the global and regional processes; review of the state of forestry in the region; the forest resource assessment 2000; review of recent developments and prospects in the coming year in the forest products markets; review of activities of its subsidiary bodies and of meetings held over the previous year under joint auspices.

Study tour on forest and forest industries of Canada

Industry Canada is pleased to host the millennium edition of the Joint UN - ECE Timber Committee and the FAO - European Forestry Commission Study Tour to Canada. The tour will begin in eastern Canada on September 9th and will terminate in western Canada on September 16, 2000.

The theme is certification of sustainable forest management and forest products. Participants will have the opportunity to see Canadian forest practices in operation. In addition, participants will also visit a number of industrial plants manufacturing a range of forest products.

Canada is symbolized by the abundance of its natural resources and, in particular, by its vast forests which cover about 418 million hectares. With a land mass of 921 million hectares, Canada accounts for about 10% of the world's forest area. Of the total forest area, some 235 million hectares are considered commercial forests capable of producing timber and a variety of other forest related benefits. About 120 million hectares are managed for timber production, while the remaining forests have either not been allocated or are not accessible.

Canada's forest lands for the most part are publicly owned and are overseen by governments - 71% under provincial jurisdiction, 23% by the federal government and the balance under private ownership made up of about 425,000 individual and company landowners. Under the Canadian Constitution, the provinces retain responsibility for forest management.

In ecological terms, there are 8 forest regions in Canada ranging from the towering coastal rain forests of British Columbia to the sparse and slow growing forests associated with the northern limits of forest lands. There are about 180 different tree species found in various regions of Canada. In volume terms, 67% of the forest are conifers, 15% are hardwoods and 18% are mixed woods. The annual harvest in Canada in 1999 was about 180 million cubic metres.

Certification in Canada's forests is on the increase. Almost 12 million hectares of forest land across the country, representing an allowable annual harvest of 18.6 million cubic metres, have been certified. This amount represents 10% of the annual allowable harvest.

Canada has developed a vibrant forest industry based on this natural resource. The forest sector is Canada's leading manufacturing sector and largest net exporter. It is the cornerstone of the economy and a major component of the industrial structure and employment base of all regions of the country. In 1999, the forest industry employed more than 240,000 people in manufacturing, shipped $65 billion worth of products including exports worth more than $44 billion.

Participation in the study tour will be open to representatives of the Timber Committee and the European Forestry Commission as well as representatives related to the forest and forest industries sector from member countries of the UN-ECE and other member countries of the United Nations. The number of participants will be limited for logistical reasons.

A detailed information note including the provisional programme and a registration form can be obtained on request from the secretariat (see address on page iv) and will also be posted at the Committee's Website.

Statistics

The Committee will continue to publish its regular statistics in the *Timber Bulletin*, on forest products production and trade, trade flows of forest products, the monthly prices for forest products, and the results of the annual enquiry on forest fire.

Forest products markets

Other issues of the *Timber Bulletin* will contain the Committee's regular review and analyses of short-term developments in forest products markets. The annual forest products market review, covers trends in the previous year and is published in July/August. The results of the Committee's discussions at its annual session, when it prepares forecasts for the current and forthcoming year, are issued in November.

Forest technology management and training

The Joint FAO/ECE/ILO Committee and its Steering Committee meet in alternate years. The Joint Committee will hold its twenty-third session from 5 to 8 June 2000 in Geneva. The Steering Committee will hold its fifteenth session from 30-31 March 2000 in Lisbon (Portugal) in conjunction with the seminar on the role of women in the forestry sector In Europe and North America. More complete information on the Joint Committee activities can be found at the website: www.unece.org/trade/timber/joint-committee. The following seminars and workshops will be organized in 2000 and 2001 under the auspices of the Joint Committee.

2000

Title: **Seminar on harvesting of non-wood forest products**
Date: 2-8 October
Location: Manemen, Turkey

Objectives: The seminar will offer the opportunity to exchange experience and share state of the art knowledge on recent developments in forest harvesting, trade and marketing practices for non-wood forest products as well as their potential importance for socio-economic development. It will, in particular, discuss issues on sustainable forest operations and improved utilisation of non-wood forest products as well as the reduction of the environmental impacts and wastes in the forests and processing facilities.

Furthermore, the seminar will deal with the following issues: financial, organisational and

administrative support measures by governments, the private sector, non-governmental organisations, to promote the sustainable utilisation of non-wood forest products and its importance for the development, employment and income generation particularly for local populations. It shall also provide an overview of existing training, education and extension facilities and needs to enhance the promotion of the efficient and reduced impact utilisation of non-wood forest products.

Target groups: All forest professionals, forest owners, managers, forest industries, administrations and associations, research institutes and technology transfer and training centres.

2001

Title: **Seminar on the role of women in the forestry sector In Europe and North America**
Date: 2-6 April
Location: Viseu, Portugal

Objectives: Rather far reaching changes have taken place with respect to the positions and roles of men and women in European and North American societies at large. The forestry sector, by contrast, appears to have largely ignored this development and mostly remained 'a man's world'. There are both ethical and factual reasons why the forestry sector should acknowledge the various roles women play in and for the sector, seek to enhance their participation and create the equality of opportunity that many other sectors have come to take for granted.

Political will to foster change has been expressed. Equality of opportunity and treatment in employment as enshrined in international labour conventions has been recognized as a fundamental human right by all 174 member countries of the ILO in June 1998. In the same month, the 3rd Ministerial Conference for the Protection of Forests in Europe adopted Resolution L1 on 'People, Forests and Forestry'. In the sections of the resolution relating to women, the countries and the European Union undertake to strive to offer equal opportunity in employment, income, training and careers. They also commit themselves to recognise gender aspects in European forestry, to adapt education and training systems and programmes as well as to encourage studies on gender concerns. While momentum and political will for change have been building up, there is a looming gap in information about the actual situation as well as a lack of specific ideas and strategies for ways forward. The seminar will contribute to filling the information gaps and to devising strategies at different levels from enterprise to sector wide. Specifically, participants will explore:

- what is the current extent and nature of the involvement of women in forestry?
- why are women usually under-represented?
- what is the scope for increasing the share of women in the workforce and female participation in the sector at large?
- what opportunities and obstacles exist?
- what changes are desirable concerning women's employment and their participation in decision making in forestry at all levels?
- how can these changes be achieved?

Target groups: In order to achieve its objectives, the seminar depends on a broad participation of men and women from a cross-section of the forestry sector in Europe and North America, but also from other parts of the world.

- Forest authorities
- Forest management
- Forest industry
- Forest owners and their associations
- Forest service officials
- Forestry contractors and their associations
- Trade unions and associations of professional foresters
- Training and education
- Researchers

Title: **Workshop on new trends in harvesting with cable cranes**
Date: June (to be decided)
Location: Ossiach, Austria

Objectives: To discuss environmental concerns and policy demands favouring the use of cable crane and winch systems, taking into account soil protection and road construction restrictions. Development trends of cable systems and methods: smaller, highly mobile units, running skylines, hydrostatic transmissions etc. and newly developed wire/cable products. Planning procedures. Co-ordination between cable systems methods, landings and road transport, between the use of cable system and other equipment and machinery and between the use of cable systems operations and multiple/recreational use. Training and safety aspects of cable system operators.

Target groups: Government agencies, forest managers

Title: **Seminar on forestry meets the public**
Date: 8-11 October
Location: Ruttihubelbad, Switzerland

Objectives: Efforts to raise awareness concerning forests and forestry have been made for many years. The seminar is organized in order draw and build on this wealth of experience.

The seminar will provide a forum for the exchange of information and opinions for all interested in public relations and environmental education in forestry. It will enable participants to compare current approaches and methods, to analyze their impact and effectiveness, to swap experience and material, and to identify new opportunities of and more effective means of public relations and environmental education in forestry.

The seminar sets out to answer the following questions:

- What do we mean by public relations and environmental education in forestry?
- Are they needed?
- Which are the target groups?
- What is the message forestry is trying to drive home?
- Who are the 'messengers', which institutions are involved?
- Which means and media can most effectively convey forestry messages?
- How effective is this communication and how can impact be assessed?
- What are the deficits and how can public relations and environmental education in forestry become more effective?

Target groups: The seminar is designed for all persons working with or in forests, forestry and forest industry, in media and communication as well in environmental and general education.

- PR specialists
- Journalists
- Forest service officials
- Forest industry
- Forest owners
- Environmental NGO's
- Teachers
- Environmental educators

Assistance to countries in transition

At its annual sessions the Committee reviews its programme of assistance to countries in transition on the basis of recommendations of the team of specialists, which will meet in 2001, to ensure that it fulfils the expectations of this group of countries. The programme consists mainly in the organization of workshops, the following is scheduled: Workshop on sustainable development of marketing of wood and non-wood forest products and services for central and eastern European countries, to be decided, Chisinau, Moldova.

Country profiles on transition countries of central and eastern Europe will continue to be published.

Forest Resource Assessment 2000 - Temperate and Boreal Zones

The results of the enquiry on Forest Resource Assessment 2000 - Temperate and Boreal Zones were published.

III. BIBLIOGRAPHICAL REFERENCES

The Timber Committee publications (other than reports and associated documents) have been organized since 1994, into the following five series:

Timber Bulletin	ECE/TIM/BULL/xx/x
Timber and Forest Study Papers	ECE/TIM/SP/x
Timber and Forest Discussion Papers	ECE/TIM/DP/x
Timber and Forest Information Series	ECE/TIM/INF/x
Timber and Forest Seminar and Workshop Proceedings	no symbol

The Committee publishes the ***Timber Bulletin***, which provides regularly, detailed information on the forest products sector - statistics on production, removals, trade (total and by origin and destination), prices, the results of an annual survey on forest fires, analyses of market developments and prospects for the coming year. The contents of the ***Timber Bulletin*** in 1999 is set out in the bibliography.

The ***Timber and Forest Study Papers***, formerly publications in the ECE/TIM series, are composed of the European Timber Trends and Prospects Study (ETTS V), Forest and Forest Products Country Profiles, Forest Resource Assessment publications, medium-term surveys of the structure and capacity of the wood-based panels and sawmilling industries, and other special studies. The ***Timber and Forest Discussion Papers*** are intended to be a means of distributing current topical information in the forest and forest industries sector which might or might not become part of a more comprehensive study at some later time. Unlike the ***Timber Bulletin*** and the ***Study Papers***, the ***Discussion Papers*** have limited input from the secretariat and are published in their original language. ***Timber and Forest Seminar and Workshop Proceedings*** are not published by the secretariat, but by the host country of such activities, this explains why there is no identification code. Finally, the ***Timber and Forest Information Series*** which consists of this ***Timber Committee Yearbook***, plus ***Facts about ...*** the Committee and its two subsidiary bodies, which presents background information and activities of each of these bodies. A comprehensive list of publications appears at the back of this ***Yearbook***.

Set out below are bibliographical references to those documents issued under the Committee's auspices in 1999 which may be of interest to experts in the forest and forest products sector.

Issues of the ***Timber Bulletin*** are available on subscription (see below). Unless otherwise indicated, other documents are available on request, free of charge from the secretariat, while stocks last. **The documents are described under the same headings as the text of the *Yearbook***. Further information may be obtained from the Timber Section secretariat (see address on page iv).

1. FOREST RESOURCE ASSESSMENT 2000 - TEMPERATE AND BOREAL ZONES

Forest Resources of Europe, CIS, North America, Australia, Japan and New Zealand (ECE/TIM/SP/17)

2. PROMOTION OF SUSTAINABLE FOREST MANAGEMENT IN THE REGION

Report to fifty-seventh session of the Timber Committee (TIM/1999/2)
Report of fifty-seventh session of the UN/ECE Timber Committee (ECE/TIM/93)

3. TRADE AND ENVIRONMENT ISSUES IN THE FOREST AND FOREST PRODUCTS SECTOR

Trade and environment issues in the forest and forest products sector, special topic at the Committee's fifty-seventh session (ECE/TIM/SP/19)

4. STUDY TOUR IN IRELAND

Report of fifty-seventh session of the Timber Committee (ECE/TIM/93)

5. ASSISTANCE TO COUNTRIES IN TRANSITION OF CENTRAL AND EASTERN EUROPE

Report to the Timber Committee - Programme of Work - Activities on Countries in Transition (TIM/1999/5/Add.3)

Report on the implementation of resolution H3

The H3 database in ACCESS format is available at the Timber Committee Website

Forest and forest products country profiles

Forest and forest products country profiles have published for the following countries in transition

former Czech and Slovak Federal Republic	(ECE/TIM/64)
Romania	(ECE/TIM/65)
Hungary	(ECE/TIM/66)
Poland	(ECE/TIM/67)
Albania	(ECE/TIM/73)
Estonia	(ECE/TIM/74)
Bulgaria	(ECE/TIM/SP/1)
Slovenia	(ECE/TIM/SP/2)
Lithuania	(ECE/TIM/SP/3)
Ukraine	(ECE/TIM/SP/4)
Belarus	(ECE/TIM/SP/5)
Rep. of Armenia	(ECE/TIM/SP/8)
Rep. Of Moldova	(ECE/TIM/SP/13)
Russian Federation	(ECE/TIM/SP/14)

6. FOREST PRODUCTS MARKETS

Timber Bulletin Forest Products Annual Market Review, 1998-1999 (ECE/TIM/BULL/52/3)

The ***Timber Bulletin*** consists of 6 issues a year and is available on an annual subscription. For further information, those interested are invited to contact the United Nations Distribution and Sales Unit, Palais des Nations, 1211 Geneva 10, Switzerland (Fax N°: +41 22 917 00 27)

The contents of the ***Timber Bulletin*** in 1999, Vol. LII, was as follows:

Title	Issue
Forest Products Prices, 1996-1998	ECE/TIM/BULL/52/1
Forest Products Statistics, 1994-1998	ECE/TIM/BULL/52/2
Forest Products Annual Market Review, 1998-1999	ECE/TIM/BULL/52/3
Forest Fire Statistics, 1996-1998	ECE/TIM/BULL/52/4
Forest Products Trade Flow Data, 1997-1998	ECE/TIM/BULL/52/5
Forest Products Markets in 1999 and Prospects for 2000	ECE/TIM/BULL/52/6

RELEVANT FAO STATISTICAL PUBLICATIONS

(available from Distribution and Sales Section, Food and Agriculture Organization of the United Nations, Via delle Terme di Caracalla, I-00100 Rome)

FAO Yearbook of Forest Products 1998
State of the World's Forests 1999

7. FOREST ECONOMICS AND STATISTICS

Report of the Joint FAO/ECE Working Party on Forest Economics and Statistics, twenty-second session (TIM/EFC/WP 2/1999/9)

8. EUROPEAN FOREST SECTOR OUTLOOK STUDIES (EFSOS)

Report to the Working Party Next steps in programme of outlook studies for Europe (TIM/EFC/WP 2/1999/4)
Report to the Timber Committee Programme of Work options for next steps in outlook studies (TIM/1999/5 Add 4)
The papers and the report of the meeting of the core group on outlook studies can be obtained on request from the secretariat or from the website

9. FOREST OPERATIONS OF TOMORROW

Report of the seminar (TIM/EFC/WP 1/SEM 48/2)
The proceedings are available on request from the secretariat

10. PUBLIC RELATIONS IN THE FOREST AND FOREST INDUSTRIES SECTOR

Report to the Timber Committee Programme of Work Activities on Public Relations (TIM/1999/5/Add 1)

11. RECYCLING, ENERGY AND MARKET INTERACTIONS

Report to the Timber Committee Programme of Work Recycling, Energy and Market Interactions (TIM/1999/5/Add 2)

IV. LIST OF MEETINGS IN 2000 AND 2001

Note: The meetings are sub-divided into two categories: meetings marked (A) are open to delegates or approved representatives from all member countries of ECE as well as from other member countries of the United Nations and organizations accredited to ECE (or to FAO and ILO, in the case of meetings co-sponsored by them), while meetings marked (B) are those restricted to the countries or individuals nominated by their countries to take part in the activity concerned, e.g. a team of specialists.

2000

Date	Location	Title
5-8 September	Halifax, Canada (to be confirmed)	International Forestry Communicators Forum 2000 (B)
8-9 September	Halifax, Canada (to be confirmed)	Meeting of the FAO ECE team of public relations specialists (B)
9-16 September	East and west Canada	ECE Timber Committee study tour in Canada on certification of sustainable forest management in forests and forest industries (A)
2-8 October	Manemen, Turkey	Seminar on harvesting of non-wood forest products (A)
9-13 October	Rome, Italy	ECE TIMBER COMMITTEE fifty-eighth session in Joint Session with the FAO European Forestry Commission thirtieth session (A) *NOTE: As 2000 is Holy Year, accommodation in Rome will be difficult to arrange so delegates are strongly advised to book hotel rooms well in advance.*
Autumn (to be decided)	Finland	European Forest and Society Forum (B) Seminar on forest operations of tomorrow (A)
Autumn (to be decided)	Chisinau, Moldova	Workshop on sustainable development of marketing of wood and non-wood forest products and services for central and eastern European countries (A)
(to be decided)	(to be decided)	Seminar on strategies to stimulate and promote the sound use of wood and other forest based products as environmentally friendly and renewable materials (A)

2001

Date	Location	Title
30-31 March	Lisbon, Portugal	Steering Committee of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, 15th session (B)
2-6 April	Viseu, Portugal	Seminar on the role of women in the forestry sector in Europe and North America (A)
May (to be confirmed)	Geneva	Meeting of the Timber Committee office holders and the EFC Executive Committee (B)
14-16 May	Geneva	Joint FAO/ECE Working Party on Forest Economics and Statistics, twenty-third session (A)
June (to be decided)	Osstach, Austria	Workshop on new trends in wood harvesting with cable cranes (A)
2-5 October	Geneva	ECE TIMBER COMMITTEE, fifty-ninth session (A)
8-11 October	Ruttihubelbad, Switzerland	Seminar on forestry meets the public (A)

SOME FACTS ABOUT THE TIMBER COMMITTEE

The Timber Committee is a principal subsidiary body of the ECE (U.N. Economic Commission for Europe) based in Geneva. It constitutes a forum for cooperation and consultation between member countries on forestry, forest industry and forest product matters. All countries of Europe, the former USSR, United States of America, Canada and Israel are members of the ECE and participate in its work.

The ECE Timber Committee shall, within the context of sustainable development, provide member countries with the information and services needed for policy- and decision-making regarding their forest and forest industry sector ("the sector"), including the trade and use of forest products and, when appropriate, formulate recommendations addressed to member Governments and interested organizations. To this end, it shall:

1. With the active participation of member countries, undertake short-, medium- and long-term analyses of developments in, and having an impact on, the sector, including those offering possibilities for the facilitation of international trade and for enhancing the protection of the environment.

2. In support of these analyses, collect, store and disseminate statistics relating to the sector, and carry out activities to improve their quality and comparability.

3. Provide the framework for cooperation e.g. by organizing seminars, workshops and *ad hoc* meetings and setting up time-limited *ad hoc* groups, for the exchange of economic, environmental and technical information between governments and other institutions of member countries that is needed for the development and implementation of policies leading to the sustainable development of the sector and to the protection of the environment in their respective countries.

4. Carry out tasks identified by the UN/ECE or the Timber Committee as being of priority, including the facilitation of subregional cooperation and activities in support of the economies in transition of central and eastern Europe and of the countries of the region that are developing from an economic point of view.

5. It should also keep under review its structure and priorities and cooperate with other international and intergovernmental organizations active in the sector, and in particular with the FAO (Food and Agriculture Organization of the United Nations) and its European Forestry Commission and with the ILO (International Labour Organisation), in order to ensure complementarity and to avoid duplication, thereby optimizing the use of resources.

More information about the Committee's work may be obtained by writing to:

Timber Section
UN/ECE Trade Division
Palais des Nations
CH - 1211 Geneva 10, Switzerland
Fax: + 41 22 917 0041
E-mail: info.timber@unece.org

Website address: http://www.unece.org/trade/timber

UN-ECE/FAO Publications

Timber Bulletin Volume LII (1999) ECE/TIM/BULL/5
Timber Bulletin Volume LIII (2000) ECE/TIM/BULL/5

1 Forest Products Prices
2 Forest Products Statistics (database (chronological series, since 1964) also available on diskettes)
3 Forest Products Annual Market Review
4 Forest Fire Statistics
5 Forest Products Trade Flow Data
6 Forest Products Markets in *(current year)* and Prospects for *(forthcoming year)*

Geneva Timber and Forest Study Papers

Forest and forest products country profile - Russian Federation ECE/TIM/SF
(Country profiles also exist on Albania, Armenia, Belarus, Bulgaria, former Czech and Slovak Federal Republic, Estonia, Hungary, Lithuania, Poland, Romania, Republic of Moldova, Slovenia and Ukraine)
North American timber trends study ECE/TIM/SF
Long-term historical changes in the forest resource ECE/TIM/SF
European timber trends and prospects - into the 21st century (ETTS V) ECE/TIM/SF
Forest and forest industries country fact sheets ECE/TIM/SF
Non-wood goods and services of the forest ECE/TIM/SF
State of European forests and forestry, 1999 ECE/TIM/SF
Main Report - Forest Resources of Europe, CIS, North America, Australia, Japan and New Zealand (Industrialized temperate/boreal countries) ECE/TIM/SF

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Geneva Timber and Forest Discussion Papers *(original language only)*

Manual on acute forest damage ECE/TIM/DP/
Interim Report on the implementation of Resolution H3 of the Helsinki Ministerial Conference on the protection of forests in Europe (Results of the second enquiry) ECE/TIM/DP
The role of women on forest properties in Haute-Savoie - Initial researches ECE/TIM/DP
The Status of forest certification in the ECE region ECE/TIM/DP
Recycling, energy and market interactions ECE/TIM/DP
A summary of "The competitive climate for wood products and paper packing: the factors causing substitution with emphasis on environmental promotions" ECE/TIM/DP
Forest Certification update for the ECE Region, summer 1999 ECE/TIM/DP

ETTS V working papers

Pajuoja "The outlook for the European forest resources and roundwood supply" ECE/TIM/D
Brooks, Baudin and Schwarzbauer, "Modeling forest products demand, supply and trade" ECE/TIM/D
Baudin and Brooks, "Projections of forest products demand, supply and trade in ETTS V" ECE/TIM/D

Eronen. "Forest resources and consumption of forest products in countries in transition, 1990-2020"	ECE/TIM/DP/8
Issartel and Vikinge. "Price trends for forest products, 1964-1991"	ECE/TIM/DP/9
European forests and timber - Scenarios into the 21st century *(sold with ECE/TIM/SP/11)*	ECE/TIM/DP/10
Peck and Descargues. "The policy context for the development of the forest and forest industries sector in Europe"	ECE/TIM/DP/11

Seminar and Workshop Proceedings *(original language only)*

- Seminar on "Exploring multiple use and ecosystem management - from policy to operational practice". Prince George, Canada, September 1995
- Workshop on "Wood--an environmentally friendly material". Jonkoping, Sweden, April 1996
- Seminar on "Environmentally sound forest roads and wood transport". Sinaia, Romania, June 1996
- Seminar on "Safety and health in forestry are feasible!". Konolfingen, Switzerland, October 1996

International Forest Fire News *(two issues per year)*

Timber and Forest Information Series

Timber Committee Yearbook 1999	ECE/TIM/INF/6

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Printed at United Nations, Geneva
GE.00-22525–July 2000–1,880

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